PenguinData Chronicles

December 2013
Volume 6, Issue 1

Over the last three months I have been out on location with several different customers doing a variety of consulting work with their firms. To my surprise, when diving into issues and high concern areas and asking them "Are you using this feature or that feature that was released a while ago?" the answer was always "No". When I then showed them the features in PenguinData, it usually covered what they needed to get the job done.

I strongly encourage all owners to have one high level person designated to review all the new feature releases to evaluate if any of the new features can be instituted and used within your organization. New releases generally happen every month. In some cases you may want two or three people designated for reviewing updates if the firm is large enough. One person might cover HR, payroll and account reconciliation. Another might be an operations person, who knows what is happening within each of your shops. Better yet – you may want to empower your local shops to review the releases to see if they can implement the features, as some features are designed for Charter shops and then some for Time Warner and so on.

Remember that PenguinData is a tool, and the tool is only as good as it is being used among your organization.

I would like to take this time to wish all our customers, their employees and families a very happy and safe Holiday Season.

Thank You,

Michael W. Enters,
COO

The Latest & Greatest

from the Support Desk

Since our manuals have gone live the support tickets have decreased. Thank you for everyone who is using our manuals. We hope that they are providing you with the assistance to understand the PenguinData System process.

Currently PenguinData has ten manuals that are live. The ten Current Live Manuals are:

1. Assets/Fleet Manual

Systems Manuals:

2. Navigation
3. User Options

Workforce Manuals:

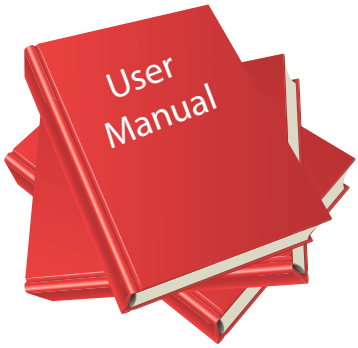
4. Data Entry
5. Office/Client Data
6. Tech/Employee Data
7. Categories
8. Account Reconciliation
9. Payroll Management
10. Workforce Reports.

The manuals are located in the user options bar in the User Manuals button. Look for the red book icon. Select the User Manual button and the list of manuals will appear on the work page. The first column

PenguinData
117 Timberlane Rd.
Spooner, WI 54801
Ph: 877-973-6484
Fax: 715-635-9008

PenguinData Chronicles
December 2013
Volume 6, Issue 1

contains the module affiliated with the manual. This feature will help narrow down the search as we add all module manuals into the list. The next column is the Subject of the manual, followed by the Name of the manual, then the Description. The last column allows the user to open the manual in a new pop-up window.



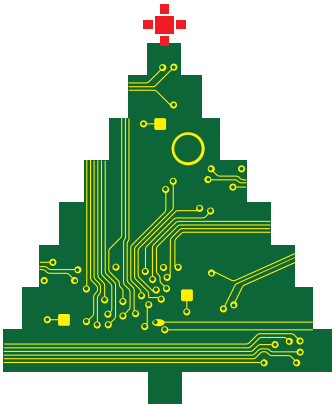
Select any of the columns to have the manual open on the work page currently being viewed, in the lower section. The "Open in New Window" link is a great feature to utilize while working, as the manual opens to the work page, and the user can view the instructions for the specific page as they are working on it. When opening the manuals please be patient as they have a lot of information included and some may take longer to open.

For anyone becoming a new PenguinData User, we would suggest a review of the Navigation Manual. This manual has been created to help the user understand not only the terms used in PenguinData, but the links that are available to the user. There are many tools built within the system that may be overlooked if the user is not aware of the functions. The Navigation Manual will help the user to understand the terms and the links. This manual will assist the user to navigate through the system and become a more efficient user.

Additional Manuals that are completed and will be live by months end are:

- Dispatch – Virtual White Board
- Escalations/Damages
- Mobile User (English and Spanish versions).

Currently the Quality Assurance (Control) manual is being updated with our latest feature releases. Once the new information is updated it will go live. The Warehouse Module will be the next manual that will be written. The Manuals will be updated with each new release.



Tech Report Tips

As the year winds down it is time to look at what really needs to be done to make sure to close out the year and get ready for a fresh start for 2014. The December tip this year deals with how to best manage PenguinData. By running a few simple reports you can make sure that the data you are using in PenguinData is up to date and correct.

When was the last time you ran you active fleet roster to make sure that all of your tech information in the system is correct? Are your technicians using the tech/contractor/employee portal to manage their address information?

PenguinData
117 Timberlane Rd.
Spooner, WI 54801
Ph: 877-973-6484
Fax: 715-635-9008

PenguinData Chronicles
December 2013
Volume 6, Issue 1

Just those two very simple items can spur staff to make the important updates and make the W2 process easier.

Have you reviewed your pay scale information to ensure that changes have not been made without your notice? Running the Active Tech Truck Roster can do this. There is a lot of great information in this one powerful report.

Currently there are over 500 reports in PenguinData. Many key operational questions can be answered by running just a few of these powerful reports.

Remember that if you have any questions please feel free to contact our support and training departments if you are not sure how to perform any of these tasks.

2013 has brought another banner year of growth and innovation at PenguinData. Our G3 EMPEROR Suite of Modules was recognized as the most innovative software platform available to the broadband industry. With this BTR Diamond Technology Review award (proving that our SaaS platform never stands still) 2014 promises to be the best year of development our software solution has ever experienced.

Continuing to expand the scope of our services, PenguinData successfully launched our Parsing Service during the second half of 2013. We want to thank all of our accounts that have taken advantage of this wonderful automation data service. The Parsing Service has allowed a tremendous leap forward in account reconciliation, while greatly increasing efficiency in the daily uploading of all work order data.

As 2013 comes to a close, and that winter feeling is in the air, PenguinData is thankful for its loyal account base. Thanks to our customers, growth has been exceptional again in 2013. In the end, growth is what PenguinData Workforce Management is all about. Our software services continue to prove that having real-time data visibility coupled with engaged and pro-active management leads to real profitable business growth. PenguinData is committed to the health of our business and that of our clients. These goals go hand in hand, and the future has never looked brighter for PenguinData Workforce Management and our customer base.

PenguinData
117 Timberlane Rd.
Spooner, WI 54801
Ph: 877-973-6484
Fax: 715-635-9008

PenguinData Chronicles
December 2013
Volume 6, Issue 1

For any questions about PenguinData's new Parsing Service please contact Doug Simmons in the Sales & Marketing Department. See you in 2014!!

Contact Doug Simmons
Sales & Marketing
602-743-1767 or
877-973-6484 x1008
E-mail:
dsimmons@penguindata.com

Paychecks Services

It's hard to imagine, but it's that time of year again. YEAR END! When you own and run a business with employees, you have to establish and maintain employee records and personnel files. Since employees come and go, many wonder how long you should retain employee records. The Internal Revenue Service (IRS) considers records pertaining to employee taxes, such as payroll, but there are other records that must be retained and in some cases maintained separately.

The IRS recommends keeping payroll records like tax withholding until you and the employee can no longer file amendments for that tax year. The IRS guidelines say to keep the records for a minimum of four years after you pay tax or the tax is due. However most experts suggest you keep employment records for a minimum of two years and for up to seven years. Most states have a two year statute of limitations on lawsuit filings by former employees. For auditing purpose however, it's best to maintain records for seven years. When the seven years is up, you should shred or destroy the documents so no one would have any access to the information.

In general, an employer could establish the following retention periods for both electronic and paper records:

- Personnel: 7 years after termination
- Medical/benefits: 6 years after plan year
- I-9 forms: Not more than 3 years after termination
- Hiring Records: 2 years after hiring

The following documents should be filed separately:

- All medical information belongs in a separate medical file
- Payroll information belongs in your payroll file
- I-9 forms should be filed separately from personnel files
- Background checks should be filed separately or can be kept with employees medical file

Since the year end is just around the corner, whether you are using PenguinData Paycheck Services or another Paycheck Service provider you should consider auditing your files for missing social security and or Federal ID numbers for your 1099 personnel. Other things you should consider in your internal audit is updating vacation and sick time (PTO) and updating your wage information for your employees. Year end is also a good time to update your SUTA rates providing the rates to

PenguinData
117 Timberlane Rd.
Spooner, WI 54801
Ph: 877-973-6484
Fax: 715-635-9008

PenguinData Chronicles
December 2013
Volume 6, Issue 1

your Paycheck Service or updating them within your internal system.

Don't forget, using PenguinData Paycheck Service, these items can be tracked for you. Our system can maintain I-9 information, Workers Compensation Rates, track wage history, benefits and a range of other information. Let us be your source.

Programming Development

As we close out the development calendar for 2013, we are planning our primary development areas for next year. Key areas targeted for development in 2014 include:

- Mobile apps for Android and iOS
  - o Native smartphone apps to provide better mobile performance, and the ability to continue working when outside of cell coverage.
- Scheduled report runs
  - o The ability to set specific reports to automatically run daily, weekly, or monthly, and be sent to an email distribution list.
- Expansion of available web services
  - o Addition of APIs for Warehouse, QC, Dispatch, and the expansion of the existing Workforce, Asset/Fleet, and Work Order Management APIs
- Ability to send tech profile information to customers prior to installation via email and text message
  - o Select profile images for tech and vehicle
  - o Select what tech information is provided
- MDU Projects system
  - o A simplified interface for creating and managing jobs in MDU
  - o The ability to roll multiple tasks of jobs into a single project
  - o More customizable areas
  - o Multiple crews assigned to different tasks

Warehouse Management

PenguinData Workforce Management has a very powerful module that assists your company in eliminating unnecessary chargebacks from your customer when it comes to your customers CPE. Also, the Warehouse Dashboard has several alerts here that should be monitored daily:

- Aging CPE in Warehouse
- How many aged pieces are issued to technicians
- Customer Returns on hand
- Defective Equipment on hand

Each of these alerts can be customized to fit your customers' requirements for CPE. These alerts and other critical warehouse settings can be found in Categories within the Warehouse Module.

There are several features I will suggest you use on a daily/weekly basis.

1. When adding New Inventory into your warehouse we strongly recommend that all CPE is scanned by physically scanning the

PenguinData
117 Timberlane Rd.
Spooner, WI 54801
Ph: 877-973-6484
Fax: 715-635-9008

barcodes on the CPE and NOT scanning anything into inventory from the "manifest/barcode" sheet your customer gives you.

Inventory			
Add New Inventory	Check-Out Inventory	⇨	MSO Buffer Recon
Alter Equipment	Dish Return Authorization		New Inventory Reconciliation
Bulk Alter Headend	Drop Off To Cable Co.		Old Equipment
Bulk Check-In	Equipment - Customer Returns		Old Tech Equipment
Bulk Customer Return Check-In	Equipment - Defective		Pending Dispatch CPE Returns
Bulk Defective Check-In	Equipment Status		Reassign Inventory
Bulk Equipment Type Change ⇨	Inventory Reconciliation		Refresh CPE Warehouse Date
Check-In Inventory	Lost Equipment		

a. Once the CPE has been scanned in we suggest you go to WAREHOUSE>INVENTORY>NEW INVENTORY RECONCILIATION. This feature will list all of the CPE that was just scanned into your warehouse by user. You will now put a check mark in the selected areas that you DO NOT want to Reconcile and then beginning scanning the barcodes on the Manifest/Barcode sheet your customer gave you when you left their warehouse. Once you have scanned all the serial numbers, select Submit and PenguinData will display the following reports:

i. Blank Report – indicates everything physically scanned matched with what was scanned on the manifest/barcode sheets. This does not require any further actions.

ii. Two-part report titled MSO Inventory Reconciliation

1. Total Scanned In To Inventory – Not On Sheet
   a. This equipment needs to be returned to your customer as soon as possible as it most likely has a direct correlation to the section below.

2. Total Not Scanned In To Inventory – On Sheet
   a. This needs to be brought to your customers' attention. If not your company will most likely be charged for these pieces of CPE.

PenguinData
117 Timberlane Rd.
Spooner, WI 54801
Ph: 877-973-6484
Fax: 715-635-9008

PenguinData Chronicles
December 2013
Volume 6, Issue 1

MSO Inventory Reconciliation
PenguinData Demo - Dallas - 11/29/2013

Status	Serial #	Bar Code	Equipment Name
Scanned In To Inventory - Not On Sheet	3	* 3 *	DIGITAL 2000 RF
Scanned In To Inventory - Not On Sheet	6	* 6 *	DIGITAL 2000 RF
Scanned In To Inventory - Not On Sheet	8	* 8 *	DIGITAL 2000 RF
		Total Scanned In To Inventory - Not On Sheet:	**3**

Status	Serial #	Bar Code	Equipment Name
Not Scanned In To Inventory - On Sheet	11	* 1 1 *	
Not Scanned In To Inventory - On Sheet	12	* 1 2 *	
Not Scanned In To Inventory - On Sheet	13	* 1 3 *	
		Total Not Scanned In To Inventory - On Sheet:	**3**

2. Inventory Reconciliation is a fairly simple process to undertake in your warehouse that can be done monthly, bi-weekly or weekly. This feature allows you to select a model of CPE in Inventory and then your warehouse team can physically scan all of the CPE in the warehouse. Once they are done scanning all of the make/model of CPE they can hit submit and PenguinData will give them a report of what is in inventory in PenguinData Warehouse Module that has NOT been physically scanned during the Inventory process. The second section of this report will show any equipment that was physically scanned but NOT in Inventory.

3. MSO Buffer Reconciliation is the third and one of the most important features of the Warehouse Module. We know that several MSO's send out daily, weekly Buffer reports to what they have in their system for your particular company. Some MSO's are more in-depth with these reports than others. Whether it is a straight up Buffer Report with CPE in Lost, Return or Tech status or it is a MOVE report where CPE went from "T" Status to "H" Status (House Account) and /or it is just a report showing all the CPE in "R" status in your technicians' buffers. Most of the "R" status CPE is moved to these buffers in error by your technicians and or dispatchers.

   a. When you receive these reports you can break them out by each status, L for Lost CPE, R for Return CPE, T for Technician Stock.

PenguinData
117 Timberlane Rd.
Spooner, WI 54801
Ph: 877-973-6484
Fax: 715-635-9008

PenguinData Chronicles
December 2013
Volume 6, Issue 1

b. Set the settings area in Warehouse>Inventory>MSO BUFFER RECONCILIATION to pull the required information from the Buffer Spreadsheet your customer sent to you.

c. Now click to upload the file and a report will automatically show in the section called Recent Imports. Open this file and you will see a similar report to what we have attached below.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Equipment Summary		Demo Site, LLC - Dallas - 11/22/2013											
2	Serial #	Equipment Name	MSO Date	MSO Status	CORP	PD Date	PD Status	PD Headend	Tech	Previous Location	Operator ID	Equipment Type	Tech ID	Office Name
3	4432C8C94A73	WIRELESS GATEWAY DORY	11/18/2013	L		10/13/2013	Delivered To Customer 841054		2737 - Staley, Mario	0000000000008737	00E	TECH DORY D3	2737	Dallas
4	MA1250EX8694	MOTOROLA MOCA HDDVR CLI	11/12/2013	L		10/01/2013	Delivered To Customer 532354		2767 - Jones, Frank	0000000000008700	00E	MEDIA HUB	2700	Dallas
5	4432C8C76893	WIRELESS GATEWAY DORY	11/12/2013	L		11/21/2013	Dropoff to cableco			0000000000008700	00E	TECH DORY D3	2700	Dallas
6	001DCD5609AC	D3 MODEM	11/18/2013	L		11/04/2013	Lost		TERM - Smith, Jose	0000000000008700	00E	DOCSIS 3.0 LSE	2700	Dallas
7	3300151023230	TOUCHPAD	11/18/2013	L		09/25/2013	New Inventory			0000000000008700	00E	HM SEC PAD	2700	Dallas
8	PKCRNKZBN		11/12/2013	L			NOT FOUND			0000000000008846		RN CIS HD	2746	
9	A47AA470F41C		11/04/2013	L			NOT FOUND			0000000000008744		SATIVOPRMR HST	2744	

d. This report will show you all the equipment you just imported and it will match it to what the current status of that piece of CPE in PenguinData is. It will tell you if your technician installed the equipment on a work order, if it's in Lost status in PenguinData, in New Inventory in PenguinData, or if it has been dropped off to the Cable Company or NOT FOUND meaning it has never been in PenguinData for any reason. You can now begin researching the ones that you really need to research.

These are just a few of things in PenguinData Workforce Management that can help you eliminate unnecessary chargebacks. If you should have any questions or concerns or would like to discuss possible consultation of your warehouse process please feel free to give us a call.

Holiday Greetings
to all our clients and their families from all of us at PenguinData.
We hope that everyone enjoys a safe and joyous Holiday Season
and a Happy and Prosperous New Year!

www.penguindata.com
PenguinData
117 Timberlane Rd.
Spooner, WI 54801
Ph: 877-973-6484
Fax: 715-635-9008